

Member Services Record Retention Plan

Updated 10-20-06

Type of Record	Description	Retention Period	Person Responsible	Format	Location
Database Permanent	Data on section membership history and volunteer committee history.	Permanent	Section Specialist and Member Services Administrator	Electronic	Server
Committee Records	Records documenting membership and activities of standing committees, study groups and task forces including rosters, minutes, annual reports, special reports.	a) Annual Reports: permanent b) Minutes: permanent c) Rosters: 5 years d) Other records: 5 years agendas, correspondence, related documentation.	Member Services Program Assistant	a) Electronic b) Electronic c) Hard copy and/or database d) Electronic and/or hard copy	a) Server b) Server c) Database, office or off-site d) Office or off-site

Type of Record	Description	Retention Period	Person Responsible	Format	Location
Section Records	Records document administration, membership and activities of sections including rosters, executive committee agendas and minutes, annual reports, correspondence and related documentation	a) Annual Reports: permanent b) Minutes: permanent c) Rosters: 5 years d) Other records: 5 years	Section Specialist	a) Electronic b) Electronic c) Electronic and/or hard copy d) Electronic and/or hard copy	a) Server b) Server c) Office or off-site d) Office or off-site
Database Permanent	Data on ONLD Executive Committee membership and subcommittee chairs.	Permanent	Member Services Specialist	Electronic	Server

Type of Record	Description	Retention Period	Person Responsible	Format	Location
Oregon New Lawyers Division	Records documenting administration, membership and activities of Division including rosters, executive committee agendas and minutes, correspondence and related documentation	a) Minutes: permanent b) Award recipients: permanent c) Agendas: 5 years d) Related documentation: 5 years	Member Services Specialist	a) Electronic b) Electronic c) Electronic and Hard copy d) Electronic and hard copy	a) Server b) Server c) Office d) Office

Type of Record	Description	Retention Period	Person Responsible	Format	Location
Preference Poll and Election Records	Records document polls and elections including notices, candidate statements, nominating petitions, candidate photos, ballots, correspondence and related information Results from polls and elections	a) Ballots, envelopes, etc.: 90 days from election b) Candidate photos: Judicial- 5 years HOD- 5 years c) Nominating petitions – 5 years d) Voter's Pamphlets – permanent e) Related information: 5 years f) Results: permanent	Member Services Administrator	a) Hard copy b) Electronic and Hard copy c) Electronic and Hard copy d) Electronic e) Electronic and hard copy f) Electronic	a) Office b) Office c) Office d) Server e) Office f) Server
Database Permanent	Data on public member volunteers	Permanent	Member Services Administrator	Electronic	Database
Public Member Records	Records documenting the public members of the board, including public member application and selection records	a) Public member selection records: 5 years	Member Services Administrator	a) Hard copy	a) Off-site

Type of Record	Description	Retention Period	Person Responsible	Format	Location
Supreme Court/Appellate Court candidates and results	Records documenting candidates, applications, interview process and questions, results	a) Recommendations from the BOG: see BOG minutes. b) Applications: 10 years c) Candidate lists, interview process and interview questions – 5 years	Member Services Administrator	a) Electronic b) Hard copy c) Electronic and Hard copy	a) Server b) Off-site c) Office and off-site
Program Outcomes and Measurements	Records documenting departmental outcomes, standards and yearly measurements	a) Department documents: 5 years	Member Services Manager	a) Hard copy	a) Office or off-site
Database permanent	Data on LCAB and Leadership College Fellows	Permanent	Member Services Specialist	Electronic	Database
Leadership College Records	Rosters of fellows, rosters of Leadership College Advisory Board (LCAB), session schedules, related materials	a) Session schedules: permanent b) Related materials: 2 years	Member Services Manager and Member Services Specialist	a) Electronic b) Electronic	a) Office b) Office

Type of Record	Description	Retention Period	Person Responsible	Format	Location
Leadership Resources	Bar Leader Handbook	a) Keep 1 hard copy-5 years	Member Services Administrator	a) Hard copy and electronic	a) Office
Appointments and Committee Preferences	Preference lists for volunteers of committees.	a) Committee preference listings: 1 year	Member Services Administrator	a) Hard copy and electronic	a) Office